Project Managers Team
Project Management Kaizen
Department of Economic Development (IDED)

Mission:

To engender and promote economic development policies and practices which stimulates and sustain Iowa's economic growth and climate and that integrate efforts across public and private sectors.

August 22 to 26, 2005

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Team Members

Beth Balzer
Ken Boyd, IDED Finance Team
Cara Conrad
Bill Demuth
Maureen Elbert,
Kossuth County Economic
Development Corporation
Mark Fisher
Jim Gossett,
Carroll Area
Development Corporation
Michael Gould
Kelly Halsted,
Kathy Hill

Peggy Kerry
David Mahs
Ames Economic
Development Commission
Jane Maynes
Marty Mitchell
Jennifer Porter
Kay Snyder
IDED Communications Team
Dick Sorenson
Brett Weber
Dick Vegors
Allen Williams

Resource Assistance:
Don Dursky

Event Coordinator:
Sherry Timmins

Sponsor:
Jeff Rossate

Facilitators: Tom O’Neill & Tom Bednar

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Scope

The Project Managers Team is made up of fourteen team members. Some project managers have worked for IDED for several years, while other managers are fairly new to the agency. Some managers have been reassigned from other agency areas and are transitioning into the team.

Projects are either targeted by IDED, or come unsolicited to the agency. Generally, managers are responsible to recruit new business or to work with existing Iowa business. Projects are assigned based upon defined geographical in-state, out-of-state, and international territories. A project may also be assigned based upon a manager's experience in working with a particular type of industry. Each project manager handles their project portfolio somewhat differently

Through mapping IDED hopes to identify where processes exist or are lacking and opportunities to standardize operations such as assigning projects and work load, initiating "best practices" expectations and setting a baseline for following leads that move into viable projects.

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Objectives

1. Develop a standard operating procedure checklist which identifies “best practices” and expectations for project managers to manage projects.
2. Develop a baseline of project “leads” in order to establish measurable goals for improvement in moving leads into viable projects.
3. Decrease Project Manager response by 66% percent, from three days to one day, time spent assigning inquiries and responding to an initial contact from an unsolicited project.
4. Increase from 10% to 100%, project manger participation for entering and maintaining Prospect Tracking System (PTS) information.
5. Develop a standard operations procedure checklist to assist project managers in communicating effectively internally and externally on projects, and notifying other resources that are needed to effectively support project management.
6. Develop a standard operations procedure reference guide aid in training newly hired or transitioning project managers.
7. Develop an updated PDQ (Position Description Questionnaire) for Project Mangers.

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Objective #1

Develop a standard operating procedure checklist which identifies “best practices” and expectations for project managers to manage projects.

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Objective #1 (continued)

- Receive project assignment from management, outside source, etc.
- Check PTS for company listing
- Client contact
- Site location research, if required
- Prepare state offering/proposal

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Objective #1 (continued)

- Client Follow up
- Prepare for Site visit
- Conduct site visit
- Post Site Visit
- Client site decision
- Client commitment
- Post commitment relationship management

Objective #2

Develop a baseline of project “leads” in order to establish measurable goals for improvement in moving leads into viable projects.

Define Project, Lead and Prospect:

Project: Companies with defined project parameters and timeframe for project.

Lead: Companies with a recognized interest in Iowa. Dialogue occurs between the company and state where information is shared.

Prospect: Targeted company that shows interest in sharing information

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Objective #2 (continued)

- Divide existing 456 leads and projects accordingly; communicate results.
- Track the time it takes for each lead to become a project over a one-year period to establish baseline. Track in increments of 0-3 months; 3-6 months; 6-12 months; 1-3 years; 3+ years.
- Identify goals for each time period to reduce the amount of time advancing a lead into a project.

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Objective #3

Decrease from three days to one day, time spent assigning inquiries and responding to an initial contact from an unsolicited inquiry (non conventional inquiry)

Activate trade leads technology in PTS

Process:

- Management or associate receives call
- Basic data entered
- Assigned to PM
- Actions taken documented
- PM confirm contact was completed

Objective #4

Increase by 90%, from 10% to 100%, project manager participation for entering and maintaining Prospect Tracking System (PTS) information.

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Training

- Offer two opportunities to gain PTS training the weeks of September 6th and September 12th in front of a computer.
- Tuesdays and Thursdays from 9:00 AM to 10:00 AM of starting September 12 until the end of the month Cara Conrad, Don Dursky and Cheryl Youland will be available for individual training & questions at your work stations.

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Project & Lead Entry into PTS

- By September 19th – 30% of your projects and leads will need to be entered into the PTS.
- By October 1st – 60% of your projects and leads will need to entered into the PTS
- By October 19th – 100% of your projects and leads will need to be entered into the PTS

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Cash Rewards will be awarded to PMs reaching the 100% project entry goal prior to October 19th!

Close-outs of Past Projects

- By October 19th, have 100% of projects that have been finalized be closed out in PTS
- If assistance is needed, please ask (Cara, Don or Cheryl)

Management Commitment

- Management commitment to use PTS as a means of communication about project assignment, status and activity
- Develop a technology taskforce with management's involvement to identify technology needs and cost associated (recommendations need to be made within 120 days) Michael, Peggy, Cara, Jeff, Bill and Don

Technological Improvements

- Microsoft programs interaction (i.e. ability to attach e-mail communication to project/lead; attach offer letter, project review forms, view business finance action on projects etc)
- Roll out 1st of November
- Training to follow

Objective #5

Develop an SOP checklist for PM to effectively communicate internally and externally regarding projects.

Objective #5 (continued)

- Developed checklist for project communication
- Will schedule weekly Incentive Review Team meeting
- Developed internal project review form
- Developed community project response checklist

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Objective #5 (continued)

- Will develop templates for standardized:
  - Introduction letter
  - Incentives proposal letter
  - Project letter/RFI to communities
  - Industry specific marketing verbiage
  - Program descriptions (short version/ expansive version)
  - Examples of "Best Practices" community responses

Objective #6

Develop Standard Operating Procedure or Training Guide for training newly hired or transitioning Project Managers.

Objective #6 (continued)

Training Guide Overview

To create a training guide to introduce the new or transitioning project manager to the resources and experiences that he or she will encounter during a career as an IDED Project Manager.

Objective #6 (continued)

SHORT-TERM

- Develop training guide Table of Contents.
- Table of Contents Submitted to Jeff by Friday Sept 2nd for review and approval.

Objective #6 (continued)

MID-TERM

- Revise existing documents from procedures and policies manual (1992) by Oct. 7th
- Collect templates, checklists, best practices documents from other Kaizen teams as they become approved.

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Objective #6 (continued)

LONG-TERM

- Create new resource materials.
- Collect templates, checklists, and best practices documents from other Kaizen teams as they become approved.
- Submit Training Manual to Jeff and Susan for review and approval by December 2nd
- Review site map of Business Development intranet site with Don Dursky to determine the implementation plan.

Objective #7

Develop an updated PDQ (Position Description Questionnaire) for Project Managers

Objective #7 (continued)

Update the PDQ to incorporate the essential functions of both new/transitioning and existing project managers

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Action Items – Kaizen Newspaper

Item #	Problem	Action	Who	When
21	Consistency in identifying project parameters	Develop download form from PTS for identifying project parameters	Michael, Peggy, Don Dursky	Oct 1
17/32	Inconsistent communication & project skills	Create project teams as appropriate	Kathy – management	Oct 1
24/55/60	Duplication, wheel recreation	Gather all specific PM research to Intranet	Kathy coordinate w/group 6	
25		Intranet resource for external referrals	Kathy to coordinate w/group 6	
	Inconsistency in info gathering	Create RFI template	Michael & Maureen	Nov 1

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Action Items – Kaizen Newspaper

13	Communities not providing required info	Develop standard community response RFI template	Michael & Maureen
66	Best practice	Create standard for offering/proposal	Kay, Michael, Maureen, Peggy, Kelly
19	Best practice	Community training for international visitors/cultural training	Int’l team

Action Items – Kaizen Newspaper

Item #	Problem	Action	Who
1	Determining the difference between the 456 companies	Separate companies into leads, projects, and prospects	Beth/Susan
2	Communicating HL & HP	PDI newsletter; ongoing?	
3	Establishing baseline for leads moving to projects	Modify PTS for Lead Date, Project Date; Develop report	Beth/Susan
4	Track responsiveness to inquiries	Develop methodology for documenting responses using trade lead technology available but not used in PTS	Don and Bill
5	Increase PTS participation	Provide twice-weekly training sessions; cash rewards for 100% PTS compliance prior to 10/19	Kelly, Don, Cheryl, Cara

Action Items – Kaizen Newspaper

Item #	Problem	Action	Who	When
1	Lack of PTS Training	Create training opp.	All	1) Week Sept. 6 2) Week Sept. 12
2	Lack of PTS Training	Create training opp.	Individual	Sept. 12 – Sept. 30
3	Lack of PTS Training	Create deadlines	All	1)Sept. 19 – 30% 2) Oct. 1st – 60% 3) Oct. 19th – 100%
4	Management commitment to PTS	Address with management	Kelly	Sept. 30th
5	Technology Resources	Develop Task Force	Kelly, Cara, Michael, Jeff, Don	Recommendation by Jan. 31st 2006
6	Technology Improvements	Continue to enhance PTS	Kelly & Don	11/1/05 11/30/2005

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Action Items – Kaizen Newspaper

Item #	Problem	Action	Who	When
1	Template – introduction letter with client services and business climate advantages	Develop introduction letter	Dick	12/2/2005
2	Template – assistance programs	Develop program description language	Amy	12/2/2005
3	Template – Comfort letter	Develop comfort letter	Allen, Cara	12/2/2005
4	Template – Incentive proposal	Develop incentive proposal	Allen, Cara	12/2/2005

Action Items – Kaizen Newspaper

5	Template – Offer letter	Develop offer letter	Allen, Cara
6	Share "Best Practices" proposals by community	Gather examples and share with communities	Joe
7	Template – RFI/Project letter	Develop RFI Template	Dick, Michael, Maureen
8	Upload templates to Intranet	Same	Don

Action Items – Kaizen Newspaper

Item #	Problem	Action	Who
17	Involve internal expertise on projects	Add this expectation to the PDQ	Cara
21	Develop guidelines for identifying project parameters	Incorporate project parameter guidelines into training manual	Gail
22	Meeting prep checklist for project managers	Incorporate checklist into training manual	Cara
32	Develop project teams that are project specific	Add item to the PDQ	Cara

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Action Items – Kaizen Newspaper

32	Develop project teams that are project specific	Add item to the PDQ	Cara	Immediate
39	Additional training for professional development	Add item to the training manual	Marty	30-day
55	Build an intranet site for business development	Use Project Management Training Guide as the outline or site map for the intranet site and work with Don Dursky to create and upload the information onto the intranet site	Team (Gail, Jen, Marty, Cara)	90-day

Action Items – Kaizen Newspaper

56	Calendar of education topics for community development representatives and new/transitioning project managers	Promote training opportunities through the IDED website and with PDI	Gail	30 day
57	Add research function to intranet site	Add to site map	Gail	Immediate
59	Staff technology training needs	Add to the training manual	Cara	30-day
63	Training manual	Complete manual and approved for use	Team	90-day
75	Toolbox for communities – include example of good RIFs	Collect four examples of RFIs 12/2/200512/2/2005and forward to Communications to upload to website	Cara	30-day

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Parking Lot

- More territory events (lead generation)
- Website improvements
  - PM photos, geographic resolutions, expertise

Observations